Notes from Outlook Migration Webinar, April 28, 2008.

Slide 1: protocol notes.

Slide 2: We are going to cover a few things you may want to know about the new Outlook email system. Please remember that all emails systems are similar, even if there are some differences. If you have been working with GroupWise successfully, you will be able to use Outlook without difficulty after you get used to it.

Slide 3: We will be going over all of these topics for the next hour or so. We'll stop for questions several times, but don't hesitate to type your questions in the chat when ever have one.

Slide 4: This is the Outlook default screen. At least, this is how MY outlook appeared after I had been migrated from GroupWise to Outlook.

On the screen you will see the Outlook Shortcuts along the left column, your inbox emails to the right, and below this a Preview Pane, which lets you see what's in the email you have highlighted above without actually opening it.

If you want, you can change this to look more like GroupWise.

1. **Click** on **View**, **Folder List** to display your mailbox folders.

2. Click on View, Preview Pane, to remove the preview.

If you do all of these things, your default view will look more like this. (next slide)

Slide 5: **This view shows the page with the folder list added and the preview pane removed. You can also remove the Outlook Shortcuts along the left side if you want. However, I have found these shortcuts to be very helpful, so you may want to keep them.**
I am going to point out of the features that make this useful. You can always remove it later if you want, or add it back if you take if off now.

NOTE: If you choose to use the **Outlook Shortcuts** bar, you have the option to drag any item in the **Folder List** onto the **Outlook Shortcuts** bar. You may also drag and drop shortcuts to Word, Excel, etc. from either your desktop or Start menu so that they are available to you in Outlook.

Slide 6: Let's talk for a moment about the Outlook Shortcuts. We'll go through these one by one. [Point and describe each item on this page before advancing slide]

Slide 7: There are also ways to customize the Outlook Today. Just click on the Customize Outlook Today at the top. Let's take a quick look at that.

Slide 8: When you are in Customize Outlook today, you can make this the default for your outlook page when you open it by checking the box “when starting, go directly to Outlook Today.
You can select which folders you want displayed.
You can choose how many calendar days to display.
You can determine how much detail you want shown on your task list.
And you can select a style for your Outlook Today.

Then you just save the changes are you are back to the Outlook Today view as we showed on the previous slide.

Slide 9: no notes

Slide 10: Let’s go to the Inbox now.

The Inbox displays all the messages initially received by the Outlook account. These messages can be sorted by clicking the headings above the message box, or by selecting buttons that appear on the top-left corner of the pane.
[Point to enlarged pictures] You can sort by Importance, icon, flag status, or attachment. [Point to headings} or you can sort by who it’s from, subject, date received, or size by clicking on the heading.

Received email messages, appointments, and other items will be displayed in the Inbox.

Notice how some of my emails are different colors. Let me show you how to organize your inbox.

Slide 11: Go to the Organize icon, or go to Tools, then Organize.

You can organize by Using Folders. Options include moving messages selected to a specific folder or you can create a rule that automatically moves messages from a certain sender to a specific file. For instance, you could make a rule to move new messages from your manager into a folder entitled Manager Emails (or whatever you choose to name it.)

You can also (point to lower picture) organize your folders by color coding them. In mine, all of the messages from my manager are the same color. All other messages sent only to me are Blue. Messages sent to multiple recipients show black. You can try this and decide if this works for you.

Two other options in Organize include using different views of the inbox, and handling junk e-mail. You can check these out once you get to the new email system.

Slide 12: **Additional features available within received email messages [point to each one on the third line down]**
Reply Reply to the sender
Reply to All Reply to all recipients

Forward Forward to new recipients
Print Print the email message currently being read.
Copy Copy highlight text. (Button becomes active when text is highlighted.)
Follow Up Used to flag items to remind the user to follow up.
Move Allows you to Move items to the various Outlook folders
Delete Deletes items in Outlook
Next / Previous Navigates to the Next or Previous item
Font Size Allows for the changing of font size
Outlook 2002 Help Good source for learning Outlook's features

Slide 13: The **New** button is used to create new items in Outlook. The default function assigned to the New button is to create a new message.
Note: Selecting the drop down button next to the New button provides the following selections.

- Message - Create a new message.
- Appointments - Create both personal and meetings messages.
- Contacts - Use to display and create contacts in your personal e-mail address book.
- Distribution List - Create and display Group mailing lists.
- Tasks - Personal tasks and reminders
- Post in This Folder - Allows the user to post a message (similar to Reminder Notes) into the Folder that is highlighted in the Navigation Pane.
- Folder - Manages the folders in the Navigation Pane.

Slide 14: No notes

Slide 15: There are several different features available on the New Message Toolbar. Use Curser to point to picture while reading info below. Begin on left hand side of tool bar.

Send: Used to send email when completed.
Save: Saves messages to the Drafts folder.
Print: Allows the Sender to print a message before it is sent.
Cut, Copy, Paste: Used to edit email messages. These buttons will be available when text in the body of the message is highlighted.
Insert Signature: Inserts a personalized signature at the end of an email message. (I'll show you how to do this next.)
Insert File: Used to attach a file to the email.
Address: Book Allows access to the user's Address Book.
Check Names: Allows the sender to check the validity of the email addresses listed in the To:, CC:, and BC: before sending the message.
Importance: High/Low Used to set the priority at which the message will be sent.
Flag Used: to mark items as a reminder for follow up actions.
Options:This feature allows users to change several settings at one time.
These include:

- Importance
- Voting and Tracking options

- Delivery options

Font Size: Used to change the size of the font in a message
Outlook Help: Good source for information on Outlook 2002 features.

Slide 16: **About distribution lists**
A distribution list is a collection of contacts. In GroupWise we called them Groups. It provides an easy way to send messages to a group of people. For example, if you frequently send messages to the marketing team, you can create a distribution list called Marketing Team that contains the names of all members of the marketing team. A message sent to this distribution list goes to all recipients listed in the distribution list. Recipients see their own names and the names of all other recipients on the **To** line of the message instead of seeing the name of the distribution list. You can use distribution lists in messages, task requests, meeting requests, and other distribution lists.
You can easily add and delete names in a distribution list, send it to others, and print it. Distribution lists are identified with and are stored by default in your **Contacts** folder, so you can sort and assign categories to them. If you use Microsoft Exchange Server, your Global Address List can contain global distribution lists, which are available to everyone who uses that network. The personal distribution lists that you create in your **Contacts** folder are available only to you, but you can share them by copying and sending them to others.

Select a name for the list

Select MEMBERS for the list

You can do the members one at a time, or you can copy them from any email that you previously sent or received by opening that email, clicking on the names in the To, CC, or BC area, then right click select all and then copy. Once you copied the names you can paste into the ADD TO box to save time. It will bring in all of the email addresses from the previous email, including ones outside of the Outlook system.

Slide 17: **Send a distribution list**
Open a new message.
Click the message body.
On the **Insert** menu, click **Item**.
In the **Look in** list, click the folder that contains the distribution list that you want to send. Distribution lists are saved in the **Contacts** folder by default.
In the **Items** list, click the distribution list that you want to send, and then click **OK**.
Send the message.
Note If you want to send a distribution list to someone, and the distribution list contains members from the Global Address List, be sure that the recipient of the distribution list also uses that same Global Address List.

Slide 18: Right click on Contacts on Outlook Shortcuts
Select Properties

Slide 19: Choose Permissions tab
Click ADD, find name of person in address book. Click okay
Set Permission Level (REVIEWER is Read level)
Click APPLY
Do this for each person you're sharing with

Slide 20: From the main Outlook page, you will need to:

Click on **File**, **Open, Other User Folders**,

** This can be anyone who has given you delegated authority to view their Contacts list.*
*** Use whatever Distribution List you want to share.*

Slide 21: Click on Name and select me (person who created the distribution list*), then click **OK**
Select **Contacts** from the folder list, then click **OK**
Their contact list will open.
Then Double click on (the desired Distribution List Name)
Click on **File, Copy to Folder**
Select YOUR **Contacts** folder from the folder list, then click **OK**
Close the shared Distribution list.

Slide 22: no notes

Slide 23: **Create a signature for messages**
From the main Outlook window, on the **Tools menu**, click **Options**, and then click the **Mail Format tab**.
In the **Compose in this message format list, click the message format that you want to use the signature with**.
Under Signature, **click Signature**, and then **click New**.

Slide 24: In the Enter a name for your new signature box, **enter a name**.
Under Choose how to create your signature, **Start with a BLANK SIGNATURE**.
Click Next.
In the Signature text box, **type the text you want to include in the signature**.
Once you've created the signature, you can insert it in all new messages, in all messages you reply to or forward, or just in a specific message.
Type a name for your signature that will identify when the signature should be used. The first time you use this, the radio button for **Start with a blank signature** should be on.
Click on **Next.**
Type in your **signature information**. It is recommended you include your name, office, and phone number as a minimum amount of information in your signature. You can also paste text to this box from another document.
Click on **OK**.

Slide 25: To view your calendar, click the **Calendar** icon in the Outlook Shortcuts Navigation pane.
The Calendar can be viewed by the day, week, or month by selecting the appropriate button from the Tool Bar.

When the calendar view opens, the default is to display the present day. You will also see a small
Month view in the top-right corner of screen. Use the forward and back arrows on the top corners of the
Month view to change months. Click a date to view the appointments for a given day.

Meetings will have an icon displaying multiple figures . (Appointments are labeled by text information only.)
Calendar items with a reminder (alarm) set will appear with a bell icon.
To open a meeting from the any Calendar view, double-click the text.

Slide 26: Creating a personal appointment is very easy. You may click directly on the calendar on the date and time desired and then type in the appointment information. If it is a personal appointment, with no one else invited, you do not have to accept the appointment as you did in GroupWise. It will just appear on your calendar after you enter it.

Slide 27: You can also create appointments by going to File>New>Appointment.
Then fill in the subject and location, select the starting and ending times, and show time as busy, free, tentative, or out of office.

Slide 28: Meeting requests are appointments scheduled with multiple people. In the process of creating a meeting, you can check whether other attendees are busy, as long as they are using a state Exchange calendar.
(Note: This process will **not** check GroupWise calendars.)
1. To open a new Meeting request either:

- Click the drop-down arrow next to the **New** button and select either New Appointment or New Meeting Request.
- Right-click on the calendar and select either New Appointment or New Meeting Request.

Note: When in the Calendar View, New button on the Toolbar defaults to opening an Appointment. Appointments can be made into meetings by selecting the Invite Attendees... button.

Slide 29: When the **Untitled - Appointment** screen appears, add or enter:
a. **Subject:**
b. **Location:**
c. **Attachments:** button to add attachments.
d. Click the **Start time:** and **End time:** down arrows to set the date and time (or place a check mark next to All day event.
e. **Reminder:** place a check mark next to Reminder: and set the time to set an alarm.

f. **Show time as:** sets how the appointment will appear to other users.
3. Click the **To:** button to use the Address Book to add recipients to the meeting request. After selecting the recipients, click **OK.**
Note: The To->, CC->, and BC-> fields have changed to Required->, Optional->, and Resources->.

- Required -> - Attendance is required.
- Optional -> - Attendance is optional.
- Resources -> - Resources listed in the Global Address Book (e.g. meeting rooms, vehicles, etc.).

4. If you need to check the recipient's availability, select the Schedule tab. The search process may take several minutes.

Slide 30: Other Appointment Tool Bar buttons provide the following features:

- **Recurrence** - Allows you to create recurring meetings.
- **Invite Attendees...** - used to invite recipients an appointment, which effectively turns your appointment into a **meeting** request. Can also be performed from the Scheduling tab. Another advantage of the Scheduling tab is that it shows the availability of the person at the same time. (Again, be aware that this check process will not check GroupWise calendars.)
- **Cancel Invitation...** - appears when the Invite Attendees button is selected. Using this button will remove the attendees' names for the meeting request.
- **Check Names** - Appears only after the Invite Attendees button is selected. Resolves all e-mail addresses added to the Meeting request. If Outlook Web Access doesn't recognize a recipient, the Check Names dialog box will open.
- **Send** -sends the meeting request.

Slide 31: **Open** the **appointment** by **double clicking** on it.
Click on **Actions, Cancel Meeting**.
Select the **Send cancellation and delete meeting** option to notify all attendees of the meeting cancellation and to remove it from their calendars.
Click on **OK.**
Click on **Send** to send the cancellation message to all attendees.

Slide 32:
1. **Right mouse click** on the **Calendar** Icon on the Outlook Bar.
2. **Choose Properties**.
3. **Click on ADD to select the name**.
4. With **the name highlighted**, **click** on the **Permission Level** drop-down arrow.
5. Select **Reviewer** (this is read only)
6. **Click** on **OK.**

Here you can see that I have given permission to two people to view my calendar.
NOTE: Remember only Outlook users may view your Outlook calendar.

The drop down list includes a number of permission levels.
REVIEWER is like Read Only in Groupwise
Author is like Read/Write in Groupwise.

This works basically the same way that you would give permission for someone to view your contacts.

You may change any of the options listed under the permission level selection by individually picking which permissions you want to allow.

If you select DEFAULT, and then REVIEWER, everyone in the Address book can see your calendar. You may not want to do this with your own email, but if you are in charge of the account for a resource, such as a conference room, this would allow everyone to see when the room is available.

Note With author or editor permissions, a delegate has send-on-behalf-of permission. Sent messages contain both the manager's and delegate's names. Message recipients see the manager's name in the Sent On Behalf Of box and the delegate's name in the From box.

Owner Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor Create, read, modify, and delete all items and files.
Publishing Author Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author Create and read items and files, and modify and delete items and files you create. READ/WRITE
Contributor Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)
Reviewer Read items and files only. READ ONLY
Custom Perform activities defined by the folder owner. (Does not apply to delegates.)
None You have no permission. You can't open the folder.

Slide 33: Enable Calendar Reminders must be selected on your options page
Select Tools>Options
On the OTHER tab under General, select Advanced Options
Click the Reminder Option button (bottom of screen)
Scroll to the Reminder Options
Click in the Display to place a check mark and turn the reminders on.

Slide 34: No notes

Slide 35:

1. From your **Inbox** folder, **click** on **Tools, Out of Office Assistant**.
2. **Select** the option: **I am currently Out of the Office**.

3. **Type the message** you want to send to others while you are out in the **AutoReply reply only once to each sender with the following text** box.
4. **Click** on **OK.**

Slide 36: If you cannot get into the State server, you can still access Outlook through this link. The link is in the Outlook documents that were sent to you previously. It should also be an active hyperlink if you save this PowerPoint, or if it is sent to you after the Webinar ends. After you use the link, or copy and paste the link into your address bar, save the link to your favorites. It will show up as "Microsoft Outlook Web Address".
When the login screen appears, type in your USERNAME (the name you use for your email, like mine is HubskyD) and your E-MAIL PASSORD. Remember, the E-MAIL PASSWORD is the same password you use when you log into your computer.

Slide 37: This is how the internet version of Outlook appears. You have some ability to change the view on this site also.

Slide 38: No notes

Slide 39: No notes

Slide 40: Michigan.gov/bwt

PPT and notes will be posted under M/1 Conversion & MS Outlook

Slide 41: no notes